
CEO Search Process

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To: Dennis Sturtevant <dsturtevant@dwellingplacegr.org>

Hi Denny, great to catch up with you as well! I've looked over your documents, here are some comments:

1. Regarding the timeline, I think it looks good and don't have any concerns about it. I think once a search firm is engaged, they should then "take over" the sequence of events with the end date in mind. ie, they will be able to guide the committee regarding how long it will take to get candidates, the evaluation process, references and interviews, on site visits and the like. And with this timeline, you are well within a reasonable timeframe from which they can work. So, you should be able to rely on them to drive the process.

2. Regarding the Pre Consultant Board Prep assignment, I do think this is a good idea, but I also would refer to #1 above; part of the Search Firm's role is to help the board define the desired characteristics, skills, experience, etc- and that becomes their criteria for the search. So they will want to do that with you. That said, it is always helpful if the board has gone through an exercise like this ahead of time so the firm can tweak it- or challenge it- and confirm the parameters. (One powerful exercise you should do- or you can do with them- is to distinguish "must haves" from "like to haves" in a candidate. Without guidance, the criteria often becomes a wishlist of perfection- we want all these things. Eventually what is important is to determine what is absolutely required -or "knockouts" if candidate doesn't have-, and what would be a plus, but not essential. That is hard to do!

3. I think you need to be judicious in determining who will be included in this process. Because of the nature of Dwelling Place, there are of course stakeholder communications that have to occur, and you should appropriately involve them and the greater community for all kinds of reasons- not the least of which is your very long tenure, and that this will by definition be a considerable change. BUT- you DO NOT want "too many cooks in the kitchen" for the recruiting and selection process itself; it is difficult to handle many varied agendas, many don't really have strong evaluation skills, etc. So, thinking this through is important.

4. I have mixed feelings about the RFP process. On the one hand, I think it fairly outlines what you want from a prospective search firm, and gives them a good sense of deliverables. On the other, the RFP process is frankly a nuisance for the provider- and in fact some may just balk at it or say it is not worth the time to prepare it just to throw their hat in the ring. (I think you saw this happen with the last planning sessions I ended up conducting, though I am SURE the reason I continued with you was because of our fine history- I also think I understood that you didn't get any responses to the RFP request...) Now, in these very bizarre times, business is of course up in the air- so there may be more appetite to complete this. But- a suggestion would be to use Neighborworks and any other knowledgeable partners in your "business" to help identify a few firms that would likely be good candidates, do a phone or in person interview with them to get a feel, and ask them for a proposal if you like what you hear. The quality comparison of the proposals without the regimen of the RFP will give you some distinctions between firms.

My two cents, happy to talk more before your meeting if you like. BTW, no reason to make distinctions about Retained or Contingency searches at this point- some do both, some are only retained, and definitions of these two conditions vary from firm to firm. I think it is ok to just start with finding who you want to work with, and then the conditions of the assignment can be figured out from there (including guarantees, expenses, et al)

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